Helpful Hints for ProTracts

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This document contains information that ***may*** help you when using ProTracts. It is not to be considered a "cure-all" for every situation that you encounter, nor will the information herein work in every situation. This document simply serves as a starting point to help explain some of those "quirky" situations that you may run into.

1. Fill out the ENTIRE application screen

   I realize this is the obvious, but continuously, sections are left blank and questions come in concerning error messages and problems with uploading contracts, etc.

   A. ***Cost List*** – select the **CORRECT** cost list for the application
   B. ***Fund Code*** – select the **CORRECT** fund code – if the application is for Small Farmer Initiative, then pick that fund code, **NOT** the one for EQIP General.
   C. Make sure to fill in the Land Units section
   D. Select **ALL** the Resource Concerns that address the entire application
   E. Make sure to type in the **ESTIMATED cost** in the appropriate box. Funding of applications is determined by the amount listed in the **ESTIMATED** cost box, **NOT** the **CONTRACT** cost box. If you choose to write your contracts in Toolkit and upload them, you must also type in the ESTIMATED cost in that box for the application to be considered for funding.

2. The applicant name in ProTracts MUST match the Customer Name you have in Toolkit

   For example: **ProTracts**: SMITH FARMS
   Toolkit CANNOT be John Smith, it must also be SMITH FARMS.

If you need to change the name, you can change it in either location.

ProTracts: Click on ***Participant Info*** and select another name

Toolkit: Click on the ***Associated Customer Tab*** at the bottom of the ***General Tab*** screen and select another name. Make sure to mark it as the ***Decision Maker*** and either delete the other one or leave it (it's your choice).

3. <u>Consecutive Contract Items in Toolkit</u>

When building your contract in the Contract Wizard of Toolkit, you ***MUST*** make sure to go in order from top to bottom when assigning your components to each practice. This will ensure that your Contract Item Numbers are in consecutive order. If you skip around, the Contract Item window will show you that they are out of order.

DO NOT try to type in the **Item Number cell** to fix them. This will generate an error in ProTracts when you try to upload the contract. Be aware of the order of your contract items and try to keep them consecutive. If they get out of order, and you are still successful at uploading the contract, they can be re-ordered in ProTracts to fix them.

4. <u>Uploading Contracts from Toolkit to ProTracts</u>

Once your contract has been uploaded from Toolkit, make sure all items are correct and click on **CHECK RULES**. This will turn all contract items to a **PLANNED** status. If you fail to Check Rules, all items will remain in **DRAFT** status and the application will be unable to be Approved.

5. <u>Assigning Resource Concerns in ProTracts</u>

If you assign a resource concern to your first item, it will ask you if would like to assign it to all other items. Selecting **YES** will save lots of time. I would suggest picking **ALL** resource concerns that address the **entire application** in Item 1 so that all those concerns are then assigned to the rest of the items. This way you aren't leaving anything out.

6. <u>Modifying Contracts</u>

   A. When modifying contracts, make sure you **ADD** *(and then **SAVE**)* new items **BEFORE** you **DELETE or REDUCE** any of the existing items. This will ensure that you don't loose any of the money tied to the contract.
   B. If you need to ***move practices forward*** to keep your contracts on schedule, simply select the item of the practice you need to change, click on the drop down arrow beside the year, and select a future year. But don't forget to adjust the contract expiration date!
   C. Make sure to adjust the **EXPIRATION DATE** of the contract if you move an item to a future year, etc. You cannot submit the mod for approval until the expiration year has been adjusted……and remember, and contract expires **ONE YEAR AFTER** the last payment (not the same year of the last payment).

7. Making Payments
    A. When making a payment on an item you ***MUST*** click on **PAYMENT INSTRUCTIONS** ***BEFORE*** you can actually Approve the Payment.
    B. If you make a mistake on the payment (i.e. you have certified the payment for the wrong amount, or the wrong practice entirely), you can click on the **UNDO** button to undo the approval yourself. If this is done in a reasonable time frame (say 2 or 3 hours after your mistake) you can undo the payment without having to call Bethel or Shirley. If it's been a day or so, you'll have to call one of them.

8. Making Partial Payments

It is easier to modify a contract and add a new item for the remaining amount of a practice rather than making a partial payment. We have seen lots of problems with partial payments and this is a way to alleviate that. In the future – **NO MORE PARTIAL PAYMENTS!**

For example: Create a **NEW** item for the remaining amount and **REDUCE** the amount on the existing item. Once the mod has been approved, then make the payment on the item and show it as complete rather than a partial.

9. Certifying Non-Cost Share Practices

In order to show old 1996 Farm Bill contracts as COMPLETE, all non-cost share practices must be certified.

To do this, click on **Certification and Payment** just like you would do for a cost share practice. Fill out **EVERYTHING**, including the money section and click **SAVE**. This is the only way to get the item to show up as **CERTIFIED** so that the contract will show **COMPLETED.** You do not have to print a 1245, but you must complete the money section and hit Save.

10. Eligibility Problems

A. The following is the link to the **FSA Subsidiary Website** that shows up-to-date eligibility information that FSA enters. Use this site to check on the eligibility concerns that need addressing by FSA:

https://indianocean.sc.egov.usda.gov/Subsidiary/Subsidiary.do

Once in:

1. Click on **Customer Search**
2. Search your customer in **SCIMS**, once found, click on their name. You should notice their name populated in the Customer window.
3. In the top menu of that screen, click on **Subsidiary Print**
4. Put check boxes in the years that you are interested in (MAX of 3).
5. Click **Submit** and say **YES** to displaying secure items.
6. You can print out the **Producer Subsidiary Report** and take it to FSA and show them the information that is missing.

   For example: ProTracts shows the AGI missing, this print out will show AGI – Not Filed. FSA will need to enter it for you.

B. If a producer is showing eligibility issues in ProTracts, but the FSA Subsidiary Website shows that everything is ELIGIBLE, **try going into SCIMS and marking that producer as an NRCS CUSTOMER**. This has helped to clear up more than one case in the past.

C. If you are dealing with a **Farm Business Entity** and that entity has 4 owners, **EACH owner must meet all eligibility requirements**, not just the Farm itself. If you are experiencing problems with Farm entities, try checking the FSA Subsidiary website to see if each owner under the entity meets all eligibility requirements.

11. Official 1200

Make sure that the producer is signing a **COMPLETE 1200** form that includes:

1. Dollars in contract
2. Electronic signatures from State Office
3. Beginning and Ending dates of the contract
4. Each practice and amount planned